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**FLORIDA DEPARTMENT *of*  
ECONOMIC OPPORTUNITY**

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**Office of Film and Entertainment**  
**Five-Year Strategic Plan for Economic Development**  
**2013—2018**

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## Letter from the Chair

Dear Friends,

As Chairman of the Florida Film and Entertainment Advisory Council (FFEAC), and on behalf of my fellow

Council members, I am pleased to present this five year strategic plan for the state's Office of Film & Entertainment (OFE).

Through an intense one-day workshop hosted by Collaborative Labs of St. Petersburg College, research of prior reports and a web-based public comment period, the planning team has assembled the following strategies for the film and entertainment industry, as well as how they are to be supported by the state's Office of Film & Entertainment.

The film and entertainment industry in our state has experienced substantial growth in recent years, due in large part to our constant efforts in shining the spotlight on Florida as the premiere location for film, television, music and other areas of entertainment. This first step in alignment is the most critical. When we all work together, we can and will accomplish so much more.

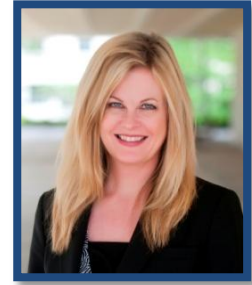
On behalf of the entire planning team, I thank you for your contributions and support of this effort.

All my best,



Gus Corbella

## Letter from the Commissioner



Dear Friends,

In November 2011, I had the opportunity to join the Department of Economic Opportunity's Division of Strategic Business Development team in a day-long workshop with stakeholders at Collaborative Labs at St. Petersburg College. There, we addressed important issues facing the state's economy and created the framework for *Florida Strategic Plan for Economic Development*. The Department asked the business community, educational institutions, policy makers, the general public and more a bold question: "What can state government do—or stop doing—that will assist you in your job creation efforts?"

Nearly one year later, I called on you to join the discussion as stakeholders in Florida's film and entertainment industry—a year-round economic engine for the Sunshine State. You brought innovative ideas and solutions to the table, engaged in open and honest dialogue, and stepped up to the plate to help formulate the OFE's five year plan.

On behalf of myself and the entire OFE team, I thank you for your constant support of the industry and of the office.

Many thanks,



Shari Kerrigan

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## EXECUTIVE SUMMARY

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Florida's film and entertainment industry is truly unique. It is important to the Florida economy as a major driver of employment and personal income, attracting revenue from other states and countries to be spent locally on wages and film production services. Florida's year-round sunshine, moderate climate, diverse scenery and business-friendly incentive program give the state an advantage over competitors. However, it is important that the industry's businesses and support organizations, like the Florida Office of Film and Entertainment (OFE), strive to constantly improve to ensure a competitive edge. This five-year strategic plan is the framework for aligning business and job creation in both the private and public sectors behind and in support of the industry.

Mandated by 288.1251, Florida Statutes, the OFE is required to submit a five-year strategic plan to be updated on an annual basis. Planning staff for the Department brought together a diverse group of film, entertainment and production stakeholders to discuss and agree on a unified direction for the industry in a statewide seminar held at Collaborative Labs at St. Petersburg College. This framework uses the common vision, goals and objectives as identified in the *Florida Strategic Plan for Economic Development*, and also uses the Florida Chamber Foundation's Six Pillars of Florida's Future Economy™. The 15 strategies address the issues affecting the industry. Tactics outlining the OFE's role in advancing the strategies are listed below each one. Metrics for accountability of the public support entity are included in the plan.

It took cooperation, collaboration and consensus to build this five-year strategic plan; it will take the same efforts to carry out the recommendations within that will lead to business and job creation in Florida. The strategies are designed to address the wide array of complex issues facing Florida's film and entertainment industry. Together, we can make Florida the number one state in the country for film, entertainment and production.

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## ABOUT FLORIDA'S FILM & ENTERTAINMENT INDUSTRY

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The State of Florida has a long history in the motion picture industry thanks to its year-round sunshine, moderate climate and spectacular scenery. Overall, the Film and Entertainment Industry is important to Florida's economy as a driver of employment, attracting revenue from other states and countries. According to the Association of Film Commissioners International (AFCI), when a high-budget feature film shoots on location, it can inject as much as \$260,000 per day into that location's economy. A high-budget weekly TV series will spend as much as \$300,000 per day on location.

Florida is home to Univision, the number one Spanish-language television network in the world. Headquartered in New York City, Univision has its major studios, production facilities, and operations in Doral, Florida. Additionally, Telemundo, with studios based in Miami, is the fastest-growing Spanish-language broadcast network for the third consecutive month among the coveted adults 18-49 demographic as of August 2012.

In addition to Florida's history with traditional types of entertainment productions, the state has a growing share of the interactive digital media entertainment industry sector. Digital media entertainment products meld together entertainment software development and publishing to provide Florida a further strategic opportunity for diversifying the economy via the entertainment industry sector. As an added bonus, the skill sets associated with this segment of the industry cross-walks to the modeling and simulation industry sectors, also important growth sectors for Florida's economy.

### Industry Employment

In 2011, there were 4,240 establishments in Florida in the film and entertainment industry that employed 21,454 Floridians. The annual average wage of \$65,398 for this industry far exceeds the state's average salary of \$42,311. In fact, no major employment sector in Florida has a higher annual average wage than the film and entertainment industry<sup>1</sup>.

### Film-Induced Tourism

Florida is home to many productions responsible for an increase in tourism. Film-induced tourism is defined as "a tourist visit(ing) a destination or an attraction as a result of the destination being featured on television, video, DVD, or the cinema screen." The feature film "Dolphin Tale," which filmed in Clearwater, is an excellent example of how productions sustain other Florida industries such as tourism, entertainment, attractions, and hospitality. Local hotels generated \$736,355 associated with the 5,875 room nights used for cast and crew (per financial incentive audit data). According to the Clearwater Marine Aquarium, since the movie premiered in theaters September 23, 2011, daily visitors have quadrupled, justifying the construction of a second visitor's center. These visitors are estimated to provide a total economic impact to the local economy of approximately \$400 million in 2013, which is estimated to increase to \$2.3 billion in 2016.

## ABOUT THE FLORIDA OFFICE OF FILM & ENTERTAINMENT (OFE)

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The Florida Office of Film & Entertainment (OFE) was originally created in 1999 by then-Governor Jeb Bush as the Sunshine State's official economic development program for the development and expansion of the motion picture and entertainment industry sectors. In 2011, the Legislature and Governor Rick Scott aligned Florida's workforce, community development and economic development functions into one newly-created agency, the Florida Department of Economic Opportunity (DEO). Florida Statute 288.1251 amended OFE's position to the Division of Strategic Business Development within DEO.













Currently, the OFE conducts many activities, such as attracting and promoting film and video production in Florida, facilitating access to filming locations by eliminating bureaucratic "red-tape," serving as a liaison between the industry and government entities, and marketing the state as a world-class production center.

### Mission

The Florida Office of Film & Entertainment builds, supports and markets Florida's entertainment industry. By collaborating with the indigenous entertainment community, OFE implements innovative ways to grow the industry, provide the hands-on, world-class service clients need and deserve, and exceed annual business goals to become a global market leader.

### Budget and Staff

The OFE performs its many duties equipped with five full time staff (including one Los Angeles-based liaison) and an operating budget of \$400,000. These duties include but are not limited to the following:

-  Strategic planning and analysis.
-  Staff support to the Florida Film Advisory Council and its committees.
-  Quarterly and annual industry assessments.
-  Industry production support.
-  Industry business and workforce development.
-  Business recruitment and retention.
-  Sales and trade missions.
-  Industry marketing and promotion.
-  Brand development and maintenance.
-  Industry government liaison services.
-  Policy and program development.
-  Industry communications, education and liaison services.

## INCENTIVE PROGRAM OVERVIEW

The Florida Office of Film and Entertainment (OFE) administers the Florida Entertainment Industry Financial Incentive Program provided for in section 288.1254, Florida Statutes. The program began on July 1, 2010 and sunsets June 30, 2016. The 2010 legislature allocated \$242 million in tax credits initially with an additional \$12 million allocated by the 2011 Legislature. Effective March 2012, the legislature allocated an additional \$42 million in tax credits to the program, totaling \$296 million.

Since the inception of the program on July 1, 2010, the OFE has received and processed 481 applications. The OFE has qualified and certified 230 of those productions for tax credits with projected Florida expenditures of approximately \$1.3 billion. Wages to Floridians associated with the 230 productions are currently projected to be close to \$760 million and are associated with 161,000 jobs for Florida residents.

The OFE awards tax credits to the pre-certified production company upon completion of the project. As a basis for the award, the OFE reviews an audit submitted by the production that has been performed by a Certified Public Accountant. The final tax credit award is calculated as a percentage (20-30%) of each pre-certified projects' final qualified Florida expenditures and cannot exceed \$8 million in total tax credits per project.

### FY 2011-2012 Annual Incentive Performance Summary

A total of 169 certified projects completed production, are in process or were awarded tax credits in State Fiscal Year 2011-2012. The projected outcomes for all projects (i.e., verified, pending and those with audits outstanding) are:

- 68,183 positions for Floridians.
- \$309,286,980 in wages for Floridians.
- \$553,707,406 in Florida qualified expenditures (Florida wages, products or services).
- 73,861 lodging/hotel room nights.
- 14,036 production days.

*"The **Entertainment Industry Incentive** program is the fundamental building block upon which we will continue to develop, attract and grow a more **permanent** and **sustainable** film, entertainment and digital media industry here in our state."* –Leah Sokolowsky, President, Film Florida

*"The tax incentive is key to keeping jobs in Florida."* –Andy Schefter, Producer

*"The Film, TV & Digital Media Tax Credit Incentive Program MUST be the key priority of this effort. It has worked brilliantly since 2005 to attract new production and projects to Florida. The state film office has the numbers to prove it, and they are impressive."* –Paul Sirmons, former OFE Film Commissioner

## STRATEGIC RECOMMENDATIONS

High-level stakeholders from Florida’s film & entertainment industry concurred with the state’s existing vision as an aspirational description of what to achieve in the future:

***Florida will have the nation’s top performing economy and be recognized as the world’s best place to live, learn, play, work and do business.***

To achieve this bold vision for Florida’s film & entertainment industry, the following concerns will need to be addressed:

Today’s Challenges	Tomorrow’s Opportunities
Lack of a unified vision for Florida’s film & entertainment industry.	Alignment of industry stakeholders around a consensus-backed five-year strategic plan.
Lack of consistency in tax credit and incentive program, and increased competition from other states and countries.	Consider revisions to the current incentive programs to increase competitiveness and maximize the return on investment and benefits to the state.
Short-term nature of projects.	Establish a permanent infrastructure to attract and retain long-term productions.
Workforce graduating from Florida’s educational institutions and leaving the state to work in competing states	Establish a permanent and successful industry in Florida to encourage the retention of the graduating workforce.

### Alignment

The statutorily mandated *Florida Five-Year Strategic Plan for Economic Development* (available at [www.floridajobs.org/FL5yrPlan](http://www.floridajobs.org/FL5yrPlan)) is built on consensus and collaboration from stakeholders throughout Florida. Looking ahead, the success of this plan will depend in large part on the alignment of Florida’s state agencies, business community, educational institutions and more to achieve the stated common vision. Film and entertainment is important to Florida’s economy, and the state’s Office of Film & Entertainment (OFE) took the necessary steps to align the industry statewide.

Statute 288.1251 called for OFE to create a five year strategic plan to guide their activities through 2017. The OFE, as part of DEO, is an organization dedicated to supporting job creation and business growth. Therefore, it was essential to understand the five-year direction of industry-related companies so that OFE could best determine what roles it needs to fill.

DEO’s planning staff utilized best practices to gather diverse stakeholders within the film and entertainment industry and develop strategies in line with the state’s economic priorities. The vision, three goals, five objectives and 15 strategies for the industry are outlined in the “Film and Entertainment Industry Strategic Plan for Economic Development At-a-Glance.” These strategies pave the way for business-led, agency-supported improvement of collaboration among the currently fragmented stakeholders; recruitment and retention of talent supply; increased opportunities for capital; construction of permanent infrastructure; and more. The OFE has developed 25 tactics that will support 13 of the plan’s 15 strategies.

# THE FILM & ENTERTAINMENT INDUSTRY STRATEGIC PLAN FOR ECONOMIC DEVELOPMENT AT-A-GLANCE

- Vision** ○ Florida will have the nation’s top performing economy and be recognized as the world’s best place to live, learn, play, work and do business.
- Goals**
- Lead the nation in global competitiveness as a location for business, investment, talent, innovation and visitors.
  - Lead the nation in economic growth and prosperity.
  - Lead the nation in quality of life.
- Objectives**
- Improve employment in Florida.
  - Expand global commerce.
  - Foster opportunities for prosperity.
  - Increase Florida’s attractiveness to workers, residents and visitors.
  - Grow businesses.

## Cross-Cutting Strategies

1. Strengthen collaboration and alignment among state, regional and local entities that would further the state’s economic vision through support of the film and entertainment industry.
2. Create, grow and sustain a statewide database viable for multi-media which showcases each region’s strengths and opportunities in support of the film and entertainment industry.

## Area-Specific Strategies

Talent Supply & Education	Innovation & Economic Development	Infrastructure & Growth Leadership	Business Climate & Competitiveness	Civic & Governance Systems	Quality of Life & Quality Places
<p>3. Employ innovations in education to lead to increased availability of skilled, permanent workforce and higher paying jobs.</p> <p>4. Work to retain and attract top industry-skilled professionals to teach at Florida institutions.</p> <p>5. Partner with high schools and higher education institutions to offer industry exposure and experience to students.</p>	<p>6. Create, grow, sustain and integrate efforts related to research &amp; development, technology transfer, commercialization and the capital investment required to create, nurture and expand innovative media and entertainment businesses.</p> <p>7. Support trade shows and industry events in their migration from out-of-state to Florida.</p> <p>8. Brand and consistently market Florida as diverse, forward-thinking, and the best state for film, multi-media and entertainment.</p>	<p>9. Establish, grow and sustain an entertainment infrastructure bank to provide low- and no-interest loans for infrastructure development for the film, multi-media and entertainment industry.</p> <p>10. Support Florida-based post-production studios (bricks and mortar) to attract and retain film and entertainment companies from concept through release.</p>	<p>11. Expand opportunities for access to private capital for film, TV and digital media.</p> <p>12. Market available existing tools to assist small/minority businesses that support the film and entertainment industry.</p>	<p>13. Develop a collaborative, comprehensive and educational in-state marketing strategy which includes digital media to engender support from the public and elected officials.</p>	<p>14. Develop policies that encourage re-development of under-utilized areas and historic districts for creative industries.</p> <p>15. Ensure Florida’s environment and quality of life are sustained and enhanced by future growth plans and development decisions within the film and entertainment industry.</p>




## Film & Entertainment Industry Cross-Cutting Priority Strategies

Currently within Florida, there are more than 60 local film offices that market their areas and provide on-the-ground assistance to production companies working within their jurisdictions. These local offices are autonomous, and are uniquely operated, funded and structured. While each entity certainly has its advantages, there is no “one-stop-shop” for permitting in Florida. This can be burdensome to production companies if a project spans multiple jurisdictions, as they would need to work with multiple local offices to obtain proper permissions. If they plan to use a filming location owned by the state (e.g., a state road, prison, bridge, park), a permit must be obtained from the relevant state agency, each of which have their own permitting structure. This process can be confusing and cumbersome for productions.


These strategies will require many years to accomplish. Beginning with conceptualization and design to full realization of implementation which most likely will extend beyond the five years covered in this initial plan. As the business community within the film and entertainment industry works toward aligning their efforts, the OFE will support these strategies in the following ways.

### **1. Strengthen collaboration and alignment among state, regional and local entities that would further the state’s economic vision through support of the film and entertainment industry.**

*State OFE Tactics:*

-  Create a strategic plan that will direct OFE’s role in supporting the business community within the film and entertainment industry.
  -  Work in partnership with Enterprise Florida, Inc. (EFI) to educate local economic development organizations and other partners about the OFE and its services.
  -  Enhance and increase OFE’s role as a liaison between private sector film and production businesses with state and local agencies to acquire proper permits in a timely manner.
- ### **2. Create, grow and sustain a statewide database viable for multi-media which showcases each region’s strengths and opportunities in support of the film and entertainment industry.**

*State OFE Tactic:*

-  Support and market the statewide database.

In addition to the two cross-cutting strategies, the plan identifies 13 strategies that are aligned with the Florida Chamber Foundation’s Six Pillars of Florida’s Future Economy™. This is an important distinction, as many of Florida’s state, local, public and private organizations have based their planning efforts on this framework.



## Talent Supply & Education


*Leading the nation in student performance and market-relevant workforce skills | Strategies 3—5*

A skilled workforce and healthy talent supply chain are critical to growing and sustaining any industry. Florida is fortunate to be home to many highly experienced industry professionals who work all over the globe. With an eye to the future workforce, Florida has many excellent film, television and digital media educational programs and institutions. For example, Florida State University College of Motion Picture Arts was ranked #17<sup>ii</sup> in the *Hollywood Reporter's* Top 25 Film Schools in the World list, while Ringling College of Art and Design ranked #23<sup>iii</sup>. The University of Central Florida's Interactive Entertainment Academy was ranked #2<sup>iv</sup> in the *Princeton Review's* Top 10 Graduate Schools for Video Game Design Study (2011), and Full Sail University has been touted as home to one of the five Best Music Programs in the country.

Despite these accolades, Florida has struggled to retain industry-focused talent. For example, 71.4 percent of 2010 graduates from the FSU Film School moved to Los Angeles or New York and are currently employed in the motion picture industries there. The following strategies focus on the necessary steps to retain and attract a high-caliber workforce in Florida.



### **3. Employ innovations in education to lead to increased availability of skilled, permanent workforce and higher paying jobs.**

*State OFE Tactic:*

-  Partner with Florida's universities and Workforce Florida, Inc. to create a partnership between educational institutions and industry businesses to develop workforce solutions and to produce and retain skilled workers.


### **4. Work to retain and attract top industry-skilled professionals to teach at Florida institutions.**

*State OFE Tactics:*

-  Collaborate with Florida's universities to include available career openings for talent within the film, entertainment and production industry through an interface with the Employ Florida Marketplace.
-  Work with Enterprise Florida, Inc. and Workforce Florida, Inc. to develop, support and promote efforts to encourage partnerships between businesses/productions and educational institutions.

### **5. Partner with high schools and higher education institutions to offer industry exposure and experience to students.**

*State OFE Tactic:*

-  Support and market early career path outreach to engage Florida's K-12 students in future industry-related opportunities.

## Innovation & Economic Development

*Diversifying Florida's economy and expanding national and global markets | Strategies 6—8*

Over the last decade the growth and success of the digital media industry has been staggering. Florida has been successful in attracting digital media companies like Electronic Arts and Firebrand Games to open their doors here. Florida is striving to continue to attract and retain this type of business, and other ancillary businesses that support them, in the hopes of fostering the “next big thing”. This is necessary in order to stay ahead of competitors in the ability to recognize and attract emerging digital media, film and entertainment sectors.


Florida's economic regions need to develop a portfolio of regional talent and innovation clusters in which Florida can be a national or global leader. Clusters – geographic concentrations of interconnected businesses, skilled labor, suppliers, service providers and other institutions in a particular field – tend to organize at regional levels. These are important because they sell goods and services outside of a state or region, bringing income into an economy. National studies have shown that successful clusters are associated with increased rates of business formation and growth, higher wages, greater productivity and more rapid cycles of innovation.

### **6. Create, grow, sustain and integrate efforts related to research and development, technology transfer, commercialization and the capital investment required to create, nurture and expand innovative media and entertainment businesses.**


*State OFE Tactics:*

-  Support private investment in research, development and production of media projects.
  -  Connect film and entertainment industry research in universities with the Florida Institute for Commercialization of Public Research to commercialize the “next big thing” in the film, entertainment and production industry.
- ### **7. Support trade shows and industry events in their migration from out-of-state to Florida.**

*State OFE Tactic:*

-  Work with Enterprise Florida, Inc. to support matchmaking sessions with international suppliers and Florida-based film and production firms.
- ### **8. Brand and consistently market Florida as diverse, forward-thinking, and the best state for film, multi-media and entertainment.**

*State OFE Tactic:*

-  Work with Enterprise Florida, Inc. and VISIT FLORIDA to create a coordinated branding effort to communicate Florida's assets that would also appeal to international film makers and producers.



## Infrastructure & Growth Leadership



*Modernizing Florida's infrastructure and growth decisions to support a competitive economy and high quality of life | Strategies 9—10*

Film, entertainment, digital media and production companies evaluate several factors when deciding where to relocate or create a new business. Investors consider proximity to landmarks, competent workforce and available resources relevant qualities. There are intangibles as well; one of the most important being how efficient the roads, rails and seaways are carrying out their tasks. Infrastructure investments have been a key driver of Florida's economy for centuries, from the early ports and trails to the major rail lines to Interstate highways and airports today.

Florida has the luxury of being home to many successful permanent production facilities such as Universal Studios in Orlando. These facilities offer permanent jobs and have a significant impact on the economy in Florida. However, much of the production activity that takes place in Florida is location based and is, therefore, short term. Permanent production facilities (“bricks and mortar”) can attract more projects to the state with a longer life span. Quality infrastructure combined with a competitive business climate will increase homegrown production activity as well as attract foreign companies.

- 9. Establish, grow and sustain an entertainment infrastructure bank to provide low- and no-interest loans for infrastructure development for the film, multi-media and entertainment industry.**
- 10. Support Florida-based post-production studios (bricks and mortar) to attract and retain film and entertainment companies from concept through release.**

*State OFE Tactics:*

-  Continue to work with Florida's Department of Management Services for access to lists of existing facilities (government or privately owned) available for industry use.
-  Work with state and local governments to support businesses seeking to locate or build permanent film, production and post-production facilities in Florida.

## Business Climate & Competitiveness





*Developing the nation's leading business climate and customer-focused support services | Strategies 11—12*

Florida has many assets to promote a strong inveterate industry, including the third largest talent base in the country (according to SAG/AFTRA), year-round sunshine, moderate temperatures and a wide array of natural settings. It also boasts a lucrative incentive program with great mutual benefits for private companies as well as the state itself. However, competition with neighboring states is increasing. Georgia and Louisiana, for example, offer similar geographic assets, strong business climates and incentives designed to attract and retain production activity.

Additionally, the state's permit structure has long been viewed as one of the most challenging in the nation. Business licensing and permitting processes are constantly changing and vary from region to region. Confusing, complex permitting and licensing structures will not entice business owners and investors to relocate and start new productions in the state. This is especially burdensome for small and minority businesses, which account for 99 percent of all businesses and 76 percent of all private sector jobs in Florida. To address the constraints on capital accessibility, state and local governments should adopt policies that encourage private capital investment in businesses within the film and entertainment industry.




### **11. Expand opportunities for access to private capital for film, TV and digital media.**

*State OFE Tactics:*

-  Work to improve and build on existing programs to be more competitive on a national level.
-  Encourage private investment in Florida film, TV and digital media.
-  Market available existing programs for film, entertainment and production businesses to access capital.
-  Improve contractual reporting to be more business-friendly while meeting all statutory requirements.

### **12. Market available existing tools to assist small/minority businesses that support the film and entertainment industry.**

*State OFE Tactics:*

-  Use Spanish-speaking resources to liaison with Hispanic companies.
-  Evaluate incentives to prioritize based on proven business models in addition to high growth areas.
-  Identify and market existing programs that assist small and minority businesses in the industry.

## Civic & Governance Systems

*Creating strong partnerships to meet Florida's economic development goals | Strategy 13*





Florida's competitiveness is tied to whether the state's civic and governance systems can function in an efficient, predictable and proactive manner. Most economic development opportunities today require collaboration among multiple agencies at all levels of government. Strategic statewide partnerships, such as interagency cooperation toward similar aspirational goals, will expedite processes to determine and ensure economic development.

To become number one in the film and entertainment industry, Florida will need effective, coordinated and collaborative partnerships – among the private, public and nonprofit sectors; among local, regional and statewide organizations; and among organizations responsible for business development, workforce, education, research and development and other related areas. Although Florida does not have a “one stop shop” for film and production projects, the individual commissions work together to tackle big issues facing the state. To increase the quantity and quality of productions in Florida, local film and entertainment representatives will need to seek additional opportunities for collaboration and alignment.

As the state's businesses in the film and entertainment industry strive for increased collaboration, the OFE will assist by supporting those initiatives.

### **13. Develop a collaborative, comprehensive and educational strategy which includes digital media to engender support from the public and elected officials.**

*State OFE Tactics:*

-  Seek opportunities for collaboration among local film offices and commissions.
-  Support the private film, digital media, TV and production companies in Florida.
-  Assist local commissions with in-state marketing.
-  Provide assistance and information to statewide, regional and local partnerships to educate public and elected officials about Florida's film and entertainment industry.

## Quality of Life & Quality Places


*Providing the nation's leading communities of choice to live, learn, work and play | Strategies 14—15*

All of Florida's residents have the opportunity to enjoy the many natural assets the Sunshine State has to offer: a variety of environmental settings, gentle temperatures and a strong arts and culture community. Additionally, workers within Florida's film and entertainment sector boast higher-than-average yearly salaries. In 2011, the average annual wage for workers in the film and entertainment industry was \$65,398, exceeding the state's 2011 annual average wage for all industries of \$42,311 by 54.6 percent<sup>v</sup>. Initial steps have been taken to attract and promote production activity in underutilized and rural areas in Florida.

Florida's quality of life and quality places can help the state to stand out in the global competition for talent, visitors and investment. To address these long-term goals, the state should create safe and stable communities with affordable housing, well-defined cities, an efficient transportation systems, high density of businesses and customers and educational opportunities.

### **14. Develop policies that encourage re-development of under-utilized areas and historic districts for creative industries.**

*State OFE Tactic:*

-  Support and market the state's Underutilized Areas Bonus for rural and urban areas.

### **15. Ensure Florida's environment and quality of life are sustained and enhanced by future growth plans and development decisions within the film and entertainment industry.**

## ACCOUNTABILITY

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As the support entity for the film and entertainment industry, the OFE provides assistance and resources to facilitate the expansion and growth of the industry in Florida. One of the main goals for the OFE is to lead Florida in global competitiveness as a location for business, investment, talent, innovation and visitors by attracting production and digital media companies to start businesses in Florida. Successful productions can spark direct and indirect job growth, infrastructure development and draw film-induced tourists to the state. The main performance measures for the OFE are the number of productions assisted that resulted in business and employment, and to increase the number of productions that reached fruition by two percent annually. This measure is a performance driver directly related to the program goal of attracting entertainment-related productions to Florida and the efficacy of the OFE's assistance in contributing to business growth and employment in the film and entertainment industry in Florida.

**Office of Film and Entertainment Performance Measure:** Number and percentage increase in productions assisted by the Office of Film and Entertainment resulting in business and employment in Florida.

Baseline FY 2012-2013	FY 2013-2014	FY 2014-2015	FY 2015-2016	FY 2016-2017	FY 2017-2018
295/ 2%	301/2%	308/2%	315/2%	322/2%	329/2%

## BUDGET RECOMMENDATIONS

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The Office of Film and Entertainment's annual budget is allocated each legislative session by the Florida Legislature. Therefore, the only financial data available are for the current State Fiscal Year, and the projected operating budget moving forward is yet to be determined. This figure does not include the salaries for the five full-time employees.

Budget	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
Salaries and Benefits	\$463,559	TBD	TBD	TBD	TBD
Other Personnel Services	\$93,767	TBD	TBD	TBD	TBD
Operating Expenses	\$149,691	TBD	TBD	TBD	TBD
Contractual Services	\$153,983	TBD	TBD	TBD	TBD
Operating Capital Outlay	\$2,559	TBD	TBD	TBD	TBD
<b>TOTAL</b>	<b>\$863,559</b>	--	--	--	--

## ORGANIZATIONAL RECOMMENDATIONS

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The current organizational structure is comprised of the following FTEs:

-  State Film Commissioner – Responsibilities include the management of OFE budget, staff, incentives, legislative agenda, communications and outreach
-  Los Angeles Liaison – Responsibilities include west coast client development and outreach, lead cultivation and distribution, and communication with Tallahassee office to accomplish goals.
-  Incentives Administrator – Responsibilities include the administration of Entertainment Industry Financial Incentive Program.
-  Production Coordinator – Responsibilities include the administration of the Entertainment Industry Sales Tax Exemption, assisting production companies in need, and liaising with state agencies regarding permitting.
-  Communications Coordinator – Responsibilities include website and social media maintenance, purchasing, outreach, advertising and sponsorship coordination.

As the needs of the film and entertainment industry continue to evolve, the services provided by the OFE must follow suit in order to meet them. Advances in the digital media and the Spanish language sectors of the industry in Florida may require some reorganization within the OFE to best meet their needs.

### References

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<sup>i</sup> Florida Department of Economic Opportunity, Labor Market Statistics Center. (October 2012.)

<sup>ii</sup> Staff (July 27, 2011) “The Hollywood Reporter’s Top 25 Film Schools List Revealed.” *The Hollywood Reporter*

<sup>iii</sup> Staff (July 27, 2011) “The Hollywood Reporter’s Top 25 Film Schools List Revealed.” *The Hollywood Reporter*.

<sup>iv</sup> Staff (March 1, 2012). “Top Schools to Study Video Game Design 2012”. *The Princeton Review*

<sup>v</sup> Florida Department of Economic Opportunity, Labor Market Statistics Center. (October 2012.)